



APPLICATION FOR RECORDS RETENTION SCHEDULE

OFFICE OF THE SECRETARY OF STATE
DEPARTMENT OF ARCHIVES AND HISTORY
RECORDS MANAGEMENT DIVISION

INSTRUCTIONS: See Publication No. 76-RM-1 for instructions on completing this form. Forward signed original to Department of Archives and History, Records Management Division, 330 Capitol Avenue, Atlanta, Georgia, 30334, Attention: Scheduling Section.

FOR AGENCY USE		FOR RECORDS MANAGEMENT USE	
Application Date	1. Agency Address <i>Teachers Retirement System Accounting and Membership Division Suite 400 - Two Northside 75 Atlanta, Georgia 30381</i>	Application Number 81-680	
Application Number 4		Date Received DEC 11 1981	Date Completed DEC 21 1981
2. Person to Contact <i>Bob Hasser</i>		Working Title <i>Systems Manager</i>	Telephone Number <i>656-2954</i>
3. Action Requested a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
4. Dates of Series Earliest Latest <i>FY78 to date</i>		5. Records Series Title (followed by title used in office, if different) <i>CONTRIBUTING MEMBER ANNUAL SUMMARY FILE</i>	
6. Division and Office Function What is the function of the Division and the Office in which this record series is created? <i>The Teachers Retirement System administers the retirement system for all teachers and administrative personnel as defined in Georgia Code 32-2901; and performs accounting and investment services, through contract, for the Georgia State Employees Retirement System.</i> <i>The Systems Division enrolls members of the Employees and Teachers Retirement System; maintains member accounts; edits and processes monthly reports on member and employer contributions; and maintains subsidiary accounting records for the Georgia State Employees Retirement System and the Teachers Retirement System.</i>			
7. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: <i>maintaining an updated record accumulative total of member contributions and interest on an annual basis.</i> Included are: <i>computer output microfilm showing member number and name and information on contributions and interest earned to date and employment/retirement status.</i> File is arranged: <i>chronologically by fiscal year; thereunder numerically by member number.</i>			
8. Monthly Reference Rate How often are records referred to which are: One to six months old <u>20</u> ; Seven to twelve months old <u>10</u> ; Thirteen to twenty-four months old <u>5</u> ; twenty-five months and older <u>2</u> ?			
9. Annual Rate of Accumulation of Records Letter-size drawers _____; Legal-size drawers _____; Shelves _____; Other (specify) <u>53 fiche</u> <u>1-1/2" per year</u>			

YES	NO	10. Questionnaire (Place an "X" in the proper column)
X		a. Is this the official copy of the series? If not, where is it?
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
	X	c. Is this a vital record?
	X	d. Does this series have historical or long term research value?
	X	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	X	f. Is the information contained in this series ever published? If yes, attach copy.
	X	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
X		h. Is there a duplication of this series in your office, or in another office or agency? If yes, where? <i>hard copy sent to reporting agency</i>
X		i. Is this series (or a major portion of it) regularly microfilmed?
X		j. Does the record series result in a computer printout? <i>hard copy sent to reporting agency</i>

11. Retention Requirements

The following requires the series to be kept:

a. State Law	<u>-0-</u> years.	d. Audit period	<u>-0-</u> years.
b. Statute of limitation	<u>-0-</u> years.	e. Administrative need	<u>-5-</u> years.
c. Federal law	<u>-0-</u> years.	f. Federal retention instructions	<u>-0-</u> years.

Attach copy or excerpt of laws or regulations. Explain administrative need.

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☐ Fiscal Year; ☐ Other _____ then,

- ☐ Hold in the current files area _____ month(s) _____ year(s); then
- ☐ Transfer to local holding area; hold _____ year(s); then
- ☐ Transfer to State Records Center; hold _____ year(s); then
- ☐ Destroy.
- ☐ Transfer to State Archives for permanent retention.
- ☒ Other (Specify) *Cut off file at end of each fiscal year - generate COM; then transfer Master COM to State Records Center, hold 5 years; then destroy; COM duplicates: hold in current files area 5 years, then destroy.*

Computer tape: *after producing COM return to data center, hold 30 days; then destroy.*

These instructions apply to all prior and future accumulations of the series.

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
<i>Donald L. Billeter</i>	<i>12/9/81</i>	<i>Joel Hubbard</i>	<i>12-9-81</i>
State Records Committee (Signature) _____ Date _____			
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)	State Auditor/Designee	<i>[Signature]</i>	<i>12-15-81</i>
	Secretary of State/Designee	<i>Canace Hart</i>	<i>12-14-81</i>
	Attorney General/Designee	<i>[Signature]</i>	<i>12-16-81</i>